

GIPS Standards Annual Conference and Workshops

Check out the [agenda](#) for the upcoming GIPS® Standards Annual Conference and see the interesting topics and great speakers scheduled for this year's conference!

Highlights include:

Andrew Bowden, Director, Office of Compliance Inspections and Examinations with the U.S. Securities and Exchange Commission will be providing an update on the SEC's activities and initiatives.

Find out what's been happening on Capitol Hill as **David G. Tittsworth, President and CEO of Investment Adviser Association** gives us an update on the latest buzz from inside the Beltway.

Learn more about the new GIPS Standards Guidance Statement for Asset Owners from **Michael G. Trotsky, CFA, Executive Director and Chief Investment Officer of the Massachusetts Pension Reserves Investment Management Board**.

Andy Andres, Senior Lecturer from Boston University will be speaking about Sabermetrics and applying performance techniques to sports analytics.

The [GIPS Standards Annual Conference](#) is scheduled for 18-19 September 2014 in Boston, Massachusetts, United States. There are only a few days left for early registration. Register by Wednesday, 20 August 2014 and save US\$200.

A [GIPS Standards Interactive Workshop](#) is scheduled for Wednesday, 17 September 2014 in Boston. The workshop will help participants master the requirements of the GIPS standards, including composite construction, performance calculation, and the creation of a compliant presentation.

The [Fundamentals of Performance Measurement and Attribution Workshop](#) is also scheduled for Wednesday, 17 September 2014 and will provide skills immediately useful in your work and offers a thorough understanding of the fundamentals of performance measurement with practical lessons for beginners and experienced analysts alike. Following a highly interactive small-group format, participants will be guided through a wide range of frequently used attribution, risk, and benchmark-analysis methods and reinforce them with live calculation exercises.

New Appointments to GIPS Executive Committee and GIPS Technical Committee

CFA Institute announces the appointment of new members to the Global Investment Performance Standards (GIPS) Executive Committee, the decision-making body for the GIPS standards and the GIPS Technical Committee, responsible for technical oversight of the GIPS standards.

GIPS Executive Committee

Carl Bacon, CIPM, Non-Executive Chairman of StaPro Group, PLC and Founder and Director of the Freedom Index Company with over 25 years of experience in the investment performance and consulting field, has been appointed as an at-large member of the GIPS Executive Committee beginning 1 September 2014. Mr. Bacon was a founding member of both the Global Investment Performance Standards (GIPS) committee and Investment Performance Council (IPC); ex-chair of the GIPS Executive Committee, the GIPS Interpretation Subcommittee and the Verification Subcommittee, and member of the Advisory Board of the Journal of Performance Measurement. He

is the author of several publications including *Practical Portfolio Performance Measurement and Attribution*, published by Wiley October 2008.

Trevor Persaud, Managing Director of Stradegi with 20 years of experience working with global asset management firms has been appointed as an at-large member of the GIPS Executive Committee beginning 1 September 2014. Mr. Persaud is an ex-chair of the GIPS Executive Committee, ex-chair of the Asia Pacific Regional Investment Performance Subcommittee, and has served at the GIPS Singapore Country Sponsor representative. He is an advisor to the Investment Management Association of Singapore (IMAS) and chair of the IMAS Risk and Performance Committee.

Mohammad Shoaib, CFA, Chief Executive of Al Meezan Investment Management Ltd., with over 23 years of experience as a highly-qualified and seasoned professional in capital markets has been appointed as an at-large member of the GIPS Executive Committee beginning 1 September 2014. Mr. Shoaib has served on various global and regional committees of CFA Institute including Asia Pacific Advocacy Committee, Global Task Force on Corporate Governance, GIPS Regional Council, and Asset Manager Code Advisory Committee. He served as a Director on the Board of Karachi Stock Exchange and Vice Chairman on the Board of Mutual Funds Association of Pakistan and is currently serving on the Board of Directors of Pakistan Institute of Corporate Governance and Institute of Capital Markets. Mr. Shoaib has to his credit many accolades and awards, the most significant of them being the “Most Influential CFA® charter holder” awarded by CFA Institute in 2006.

GIPS Technical Committee

Sunette Mulder, Senior Policy Advisor at the Association for Savings and Investment, South Africa (ASISA) with over 13 years in the investment performance field has been appointed as an at-large member of the GIPS Technical Committee beginning 1 September 2014. Ms. Mulder is an ex-chair of the GIPS Executive Committee, Investment Manager Subcommittee, and Promotion & Awareness Subcommittee. She was a co-chair of the GIPS Risk Working Group. Ms. Mulder is the chair of the GIPS Standing Committee of the South Africa Country Sponsor, ASISA and serves as the deputy chair of the CRISA committee that launched a Code for Responsible Investing by Institutional Investors in South Africa.

Damian Regan, ASIP, Director of Investment Management Risk Assurance at PricewaterhouseCoopers (PwC) with over 18 years of experience working with investment management clients, has been appointed as the next chair of the GIPS Verification Subcommittee and member of the GIPS Technical Committee beginning 1 September 2014. Mr. Regan is a past member of the GIPS Promotion & Awareness Subcommittee. He acts as the PwC International Co-ordinator for GIPS and is a member of the United Kingdom GIPS Verifiers Forum.

Staying Current

Stay up to date by following us on [Twitter](#). Please visit the [GIPS website](#) for additional information and resources, including webcasts on various topics and podcasts from past GIPS standards annual conferences. Curious to know what is being said about the GIPS standards? Check out the GIPS standards' website for the [GIPS in the News](#) section which features related news articles.